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LINE AND STAFF CONFLICT

by

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LINE AND STAFF CONFLICT IN ORGANIZATION

By

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PREFACE

In many organizations today there seems to be much emphasis on roles as opposed to people, and on relative position as opposed to contribution. Once an individual becomes affiliated with a large organization, the organization tends to de-personalize him. The individual finds that in order to play the game successfully he must assume an organizational-role personality. Often, as a result, individuals who perhaps share many similar basic values find themselves pitted against each other in a role-playing situation in organizations, when logically they should be working together toward the same goals.

I view traditional line-and-staff theory and its effects in and on organizations and their structure as one example of this seemingly irrational role playing in today's organizations. The purpose of this study is to analyze line and staff conflict as it relates to modern organization, to understand what it is and why it exists, and then to observe efforts made toward its resolution or amelioration. Finally, it is hoped, of course, that some measure of meaningful insight will accrue from the study which will be of value to managers.

This study is based on a survey and analysis of the literature in the field. Books, articles and the results of studies appearing during the last two years were used as a point of departure. Substantiating and supporting references were then investigated. These were found in some cases to extend backwards through time seventy-five years or more, a period during which the advances in science and technology, and industrial growth and development, have been phenomenal.

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CHAPTER I

LINE AND STAFF DEFINED

Line

The Term.--The origin of the term "line" as it applies to organizations is not clear, and is perhaps unimportant. While commonly supposed that in the military it has reference to the battle line or those in the line of combat, this could not be authoritatively substantiated. The term has significance primarily in conjunction with the term "staff." Line and staff were first used in military organizations. The line had reference to the structure through which duties, authority, and responsibility were delegated. The concept is one of a well-defined flow of authority from the supreme commander downward to the lowest echelons and the complementary acceptance of responsibility upward through the same channels. Line and "chain of command" are synonymous.[1]

The Line Concept.--The line concept (as well as the span-of-control problem) is often introduced in the literature by reference to the appointment by Moses of "rulers of thousands, rulers of hundreds, rulers of fifties and rulers of tens."[2] Line is descriptive of an authority relationship. It implies a superior and a subordinate. It is the scalar or hierarchical relationship in an organization through which direction and coordination are

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[1]See. U.S., Navy, Naval War College, Principles of Organization (6th ed.) November, 1963, pp. 1-16.

[2]Exodus 18.

exercised.[3] The line concept is one wherein the work to be accomplished by members of an organization is divided--departmentalized--on some rational basis and then is directed and coordinated through hierarchical echelons of superior-subordinate relationships. Authority of the superior is legitimated to the subordinate, rationally, through the superior's ability and knowledge.[4] Victor A. Thompson points out that a conceptually pure line organization must of necessity be a simple one. He states that in earlier periods of primative technology ". . . organizations could depend more on the 'line of command.'" "The superior could tell others what to do because he could master the knowledge and techniques necessary to do so intelligently."[5]

Staff assistance, as will be discussed below, was employed in an effort to keep the line abreast of knowledge and increasingly complex techniques which grew rapidly with advances in technology. The incorporation of the staff specialist into the simple line organization, while undoubtedly occurring much earlier, is evidenced in European military organizations in 1655.[6]

Line Functions and Line Executives.--With the emergence of staff specialists in organizations, came the need for distinguishing between line and staff and the first general use of either term. While it is convenient

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[3]See James D. Mooney, Principles of Organization (New York: Harper & Brothers, 1947), pp. 5-15.

[4]See Victor A. Thompson, Modern Organization (New York: Alfred A. Knopf, 1964), pp. 3-4. For a discussion of legitimization criteria, see Max Weber, The Theory of Social and Economic Organization, trans. A. M. Henderson and Talcott Parsons, ed. Talcott Parsons (New York: Oxford Univ. Press, 1947), and Chester I. Barnard, Functions of the Executive (Cambridge: Harvard Univ. Press, 1951), esp. Ch. 12.

[5]Thompson, ibid., pp. 12-13.

[6]Mooney, op. cit., p. 143.

to identify line executives as those having authority, and staff as those not possessing authority, it is neither useful nor accurate. Those in staff roles in organizations have been observed to exert strong influence upon policy and decision-making.[7] Specialist functions such as that of quartermaster in an army began to be grouped or departmentalized in a subordinate relationship under the staff general adviser. Thus with the establishment of staff "departments" which performed functions formerly performed in other departments came a differentiation between line functions and staff functions. Two criteria gave rise to the term "staff executive." In the first place, the head of the staff department acted in an executive capacity in the staff department. Secondly, staff general advisers, after influencing major line decisions, were often called upon to assist in implementing them. While the implementation was accomplished in the name of the line supervisor, the fact remains that staff assistants began to implement line decisions, which in many cases were their own recommendations. In theory, then, staff executives have no line authority except in their own staff departments, and only line executives can give orders to line subordinates.

What makes a line executive or a line function line is the purpose or mission of the organization. If the ABC Company exists for the purpose of manufacturing and selling products at a profit, the line functions are manufacturing and selling; the line executives are the heads of those line departments and their superior and subordinate executives in the chain of command. In general, contemporary theory states that whatever is not line in an organization is staff. From company to company, however, even within an industry, the designation of the line components is often arbitrary and

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[7] Ibid., p. 34.

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is subject to wide variation.[8] For example, in the Dupont Company research and development is recognized as a line function whereas in most companies it is staff. Every company either explicitly or implicitly is in business to survive. Dupont feels that the development of new products is tantamount to survival in the chemical industry.

Allen, in his study of line and staff, identifies line with initiating and carrying through the basic activities of an organization, with achieving the primary objectives of the enterprise. "Every company is organized for a specific purpose . . . but whether it be production, sales, research, or finance, the line component is the one that has direct responsibility for achieving the objectives of the enterprise."[9]

A minimum of reflection will show that such definitions as are generally used are of little usefulness. If it is the verbs such as initiating, carrying through, and achieving which distinguishes line, then the inference is that the staff neither initiates, carries through, nor achieves; if the emphasis is on the objects such as basic activities or primary objectives, then the inference is that the staff is working toward some objective other than the basic, primary objectives of the organization. If the manner in which an organization achieves its objectives is visualized as a pipeline,[10] the definition of the line component infers that some sections of the pipe are more necessary than others.

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[8]See Louis A. Allen, "The Line-Staff Relationship," Management Record (Sept., 1955), pp. 346-349.

[9]Ibid., p. 346.

[10]Leonard R. Sayles, Managerial Behavior; Administration in Complex Organization (New York: McGraw-Hill, 1964), p. 22, states, "In any organization in which there is a division of labor, there is a process by which material, ideas, people, or papers come in, have something done to them in one or many interlinked stages, and then pass out the door to a customer."

Perhaps the most meaningful terms in the definition are those which express the idea of direct versus indirect contribution. It is much more useful to think of the line as directly initiating, carrying through, and achieving the basic, primary objectives of the organization; and to think of staff as indirectly initiating, carrying through and achieving the basic, primary objectives of the organization. This is especially true of the functional staff specialists. James D. Mooney observed:

> It may suggest that the structure of organization is like a double-track railroad, consisting of line and staff as two coordinated functions. There could be no more erroneous conception. The structure of organization is single track only . . . any duty in the organization that cannot be identified as an actual link in the scalar process is an auxiliary function, adhering to the line like the sidings along the main track. This means that every staff function must adhere to the line in some dependent relation.[11]

Notwithstanding this often-cited statement, it is important to understanding of either line or staff (1) that line departments perform direct functions only to the extent that staff departments have been created to perform more indirect functions, and (2) that the typical organization of today cannot exist without staff specialists. The dependency between line and staff whether viewed as authority relationships, executives, or functions is two-way. In a two-dimensional view, there are at least three interdependent sides to an organization. The triangle consists of functional specialization, advice and counsel, and authoritative direction. The length of the sides varies with the objectives sought and the manner in which they are pursued.

Narrowly defined then, line refers to a superior-subordinate relationship. Departing from this, line functions, line executives, line departments, and line activities (and their staff counterparts) are of vague

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[11]Mooney, op. cit., pp. 33-35.

and ambiguous meaning.

Staff

The Term--The word "staff" is often used to describe a long stick carried in the hand used for support in walking. It infers support, something on which to lean. Its use in organization was adopted to connote counsel and advice.[12]

The Staff Concept.--Advice and counsel are as old as man himself, as old as organization. Mooney cites as early recorded evidence of the concept the "homeric chiefs, on whom the King depended for counsel, and the witenagemot, literally council of wise men, of the Anglo-Saxon kings."[13] This is somewhat irrelevant; people have been advising and counselling other people throughout the ages. What is significant insofar as the study of organizations is concerned is the integration, on a full-time basis, of people in organizations whose assigned duties included advising and counselling. Taylor in 1911 advocated the partial use of the military plan of line-staff as a method of simplifying shop work. He proposed to label production planning as a staff function.[14] Taylor's emphasis was on functions, not on advice and counsel, and it is perhaps unfortunate that from the writings of Taylor, and of Harrington Emerson who expanded on Taylor's theories, came the label "line and staff" as a type of organization structure. "Line and functional" would have been more in accord with Taylor's theories.

As the labor force or personnel base of an organization expands,

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[12] Ibid., p. 38.

[13] Ibid.

[14] F. W. Taylor, Shop Management (New York: Harper and Bros., 1911), pp. 1337-1480.

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The [illegible] word "work" is often used in opposition to [illegible] [illegible] in the [illegible] and the [illegible] of [illegible]. It [illegible] [illegible] [illegible]

span-of-control-problems arise. More supervisory and executive positions are created and tasks of the labor force are more minutely divided on the basis of homogeneity. The job descriptions of supervisory personnel become functionally less similar. In order to move from one position to another, local specialized training becomes necessary. The long-range effect is specific college-level preparation and a career in a specialized field. Having a profound overall effect on this growth pattern, the impact of advances in science and technology tends to mitigate against micro-division of tasks and imposes requirements for relatively more sophisticated preparation for duties at all levels. Functionally, the effect is the creation of specialists.

Specialists are those people who can do things which others cannot do, or cannot do as well. They have a partial monopoly of ability to do certain things, due to special preparation and experience. A specialist is what might be termed a professional. Specialization applies to a person, not to tasks. Division of labor or tasks is antithetic to specialization in the sense that it involves simplifying tasks to the point where anyone with a minimum of instruction can perform them. Thus, work on an assembly line represents division of labor whereas the production engineer is representative of specialization.[15]

Those specialists whose efforts contribute indirectly toward the goals of the organization are labelled functional staff specialists. (Those specialists whose efforts contribute directly, or more directly, toward the accomplishment of organizational goals are usually called line executives. Would it not be more appropriate to call them functional line specialists?)

Hierarchically, the effects of a broadening base and advancing

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[15]See Thompson, op. cit., pp. 25-26.

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technology are a lengthening of the hierarchy which hampers communication, and a threat of losing control due to insufficient information upon which to base meaningful decisions. Lack of knowledge and accurate information generates poor decisions; poor decisions generate orders and instructions which are not compatible with the environment in which they are received; poor orders and instructions, fortunately, are less likely to be carried out. To use Barnard's terms, they fall less and less within the "zone of indifference" of the recipient. Authority fails to be legitimated.[16]

Victor A. Thompson reasoned:

> . . . In an earlier period organizations could depend much more on the "line of command." The superior could tell others what to do because he could master the knowledge and techniques to do so intelligently. As science and technology developed, the superior lost . . . the <u>ability</u> to command in one field after another, but he retained the <u>right</u> as a part of his role.[17]

To alleviate the increasing depth in the hierarchy and to supply the needed knowledge and techniques to the "line of command" the general staff officer or staff assistant, whose role is to advise, counsel and assist a superior, came to be employed.

Advice and counsel rendered by staff assistants tend to follow hierarchical lines; advice and counsel rendered by functional staff specialists tend to cut across hierarchical lines.

<u>The Staff Relationship</u>.--As in the case of the line, staff should not be thought of as being descriptive of functions, departments, or people, but rather as descriptive of relationships. Thus it is said that when one <u>position</u> exists primarily to provide advice and service to another, it is in

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[16]See Barnard, <u>op. cit</u>., p. 167.

[17]Thompson, <u>op. cit</u>., pp. 12-13. Emphasis in the original.

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a staff relationship.[18] Koontz and O'Donnell stated that all line relationships are superior-subordinate relationships, and that when ". . . acting in a staff relationship, one must realize that his job is to advise and not command . . . ."[19] It is again emphasized that the meaningful perspective appears to be one of direct and indirect contribution to the objectives of the organization. Rather than saying that functional staff specialists exist primarily to serve line positions, would it not be more useful and perhaps less misleading to say rather that staff specialists perform indirect functions which make possible or effective the direct effort of those in line positions? Is it meaningful to think in terms of the "have's" and the "have not's" with respect to command authority? Certainly a line sales manager has little if any command authority outside of his own department; neither does the staff purchasing agent; but both exercise authority within their own jurisdictions and both exercise influence to some degree throughout the entire organization through means other than command authority. Also the staff is normally said to perform auxiliary functions whereas the line performs primary functions with respect to the basic objectives of the organization. Again, the terms direct and indirect express more accurately what is being described.

A useful perspective regarding the contribution of staff in an organization having been attempted, attention is now directed to the types of staff, or staff labels.

Types of Staff.--The two general categories of staff contributions have already been discussed. The hierarchical staff assistants or general

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[18]Allen, loc. cit.

[19]Harold Koontz and Cyril O'Donnell, Principles of Management (New York: McGraw-Hill, 1955), p. 141.

staff (at high levels) which advise and counsel line managers are generally labelled personal staff. Functional staff specialists are called specialized staff.[20]

Personal staff, as the adjective indicates, assist a particular person, an incumbent of an executive position. Personal staff may consist of line assistants, staff assistants, and general staff assistants. The line assistant has at least some duties directly in the chain of command and has some authority over designated line departments. He may also assume the duties of his chief in his chief's absence.

The second category, staff assistant, is frequently known as an "assistant to." He has no line authority and "may be anything from a glorified secretary to a vice president," to use Allen's description. To the extent that he is the former, he is better described as a functional specialist; to the extent that he is the latter, he is better described as a general staff assistant. Other terms used to describe staff assistants are "administrative assistant," "special assistant to," and "executive assistant."

It is the third category, general staff assistants, or staff general executives, which best exemplifies the staff concept in the direction and control hierarchy. A general staff assistant or staff general executive serves primarily as an advisor to top management in specified areas.

Staff specialists also advise and counsel. This is perhaps the basis for classifying them as staff. Actually their major contribution is the management and execution of specialized indirect functions in the

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[20]See Allen, loc. cit., for a more detailed discussion of the material which is summarized here on types of staff.

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functional framework of the organization. The personnel officer as a staff specialist performs functionally in testing, interviewing and hiring of personnel, in keeping employee records, and in a variety of other functions in his area of specialty. He also advises all other (both line and staff) executives and supervisors regarding personnel problems in their areas. The specialized staff provides a reservoir of special knowledge, skills, techniques, and experience which the entire organization can use.

From the point of view of specialization, advice and counsel furnished by staff specialists is a function of the degree of "indirectness" of their specialized contribution to the attainment of basic objectives of the organization. That is, since "line specialists" are functionally contributing more directly to the accomplishment of the basic objectives, it follows that advice and counsel would flow from the indirect toward the direct functional areas for reflection in the final product or accomplished objective. The point to be borne in mind is that in the absence of specialization the "operating" executive would necessarily devote a great deal of his efforts to the indirect functions.

Specialization along with the scientific and technological advances has made possible (and mandatory) in each of these direct and indirect functional areas the development of a highly sophisticated art and supporting techniques. The result of these phenomena combined with effective direction has been in industry an efficiency and output beyond wild imaginations of a century ago. The functional specialization concept is demonstrated even within the direct contribution (line) areas by the following meaningful observation:

> . . . Tooling has prepared the processing sheets, establishing <u>what</u> is to be done, and <u>how</u> it is to be done; and Production has said <u>when</u> it is to be done and <u>where</u> it is to be done. In the factory

they merely do it.[21]

Line and Staff, An Analysis

As the specialization trend continues, and the functions Vlcek mentions above become "professions," where will the dividing line between line and staff functional specialists be drawn? Is not tooling less direct than the "doing" in the factory? Yet today it is accepted as a matter of course that the Manufacturing Division or the Production Department is line and that the Accounting Department or the Personnel Department is staff. The meaning of the two terms cries out for critical reflection. The distinction in terms of specialization is arbitrary and perhaps not as useful as might have been imagined in attempting to theorize, rationalize, construct a model, of the process or system through which an organization accomplishes its objectives.

A thought-provoking perspective is one in which "ninety-nine and forty-four one-hundredths per cent" of the so-called functional effort in an organization is that which provides vital service, advice, and counsel to those who "merely do it"--"it" being the final, direct (and highly directed) effort through which the objectives are realized. Even with this perspective, the accurate dividing line between the indirect and the "it" defies location. This is suggestive of an integrated process--a system.

The above analysis supports the hypothesis that line is descriptive of an authority relationship, of a scalar or hierarchical phenomenon. It also suggests that as specialization increases, the line of direction from the "supreme authority" to the "mere doers" ceases to exist as a direct line.

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[21]Adolph Vlcek, Jr., "Minimizing Line-Staff Friction at Martin-Baltimore," Line-Staff Relationships in Production, AMA Special Report No. 18 (New York: American Management Association, 1957), p. 52.

From the chief executive, the longest and greatest number of line relationships extend hierarchically through the specialists performing comparatively indirect functions, who constitute the bulk of the organization. If the task of line authority is coordination of specialist contributions to keep them proportionate to the overall task of achieving the basic objectives, is not the position of the chief executive, in terms of the total organization, the only line position in the organization? All of his relationships are superior-subordinate--authoritative--in nature. This cannot be said of any other member of the organization, except perhaps of the "mere doers." Advice and counsel flow from the staff assistants to the chief executive position, and from the most indirect functional components (by way of a variety of channels) through successive stages of less indirect functional components for reflection in the accomplishment of the objectives. It is hardly meaningful to say that the "mere doers" act only upon signal through a direct chain of command because by the time the task of the "mere doers" reaches them, it has already defined by the specialists. If it is insisted that the authority relationship between the "mere doers" and the chief executive constitutes a "line," then it must be conceded that the nature of the communications in the relationship are substantially pre-determined by the staff assistants and the specialists.

Line and Staff: A Jungle of Concepts

Notwithstanding the analysis presented above, the subject of line-staff conflict must be approached with the following perspective--actually a variety of conceptions and misconceptions--of line and staff which permeates contemporary management and organization theory. The statements which follow were drawn from a variety of management texts and other literature reflecting traditional concepts of line and staff. All sources

are contained in the bibliography, but individual citation is neither practical nor would it serve a useful purpose since most of the ideas expressed are familiar ones.

- Two or three primary departments, such as manufacturing and sales are line; all other departments are staff.

- Line represents command authority; staff must influence the line or sell their recommendations to the line.

- Staff recommends; line decides.

- Staff exists to serve line.

- Staff functions are auxiliary; line functions are primary.

- Line effects; staff affects.

- Line represents the authority of man; staff, the authority of ideas.

- Staff men are specialists; line men are generalists.

- Line assistants have authority as to objectives; staff assistants do not.

- Line managers are "in the drivers seat" and there they will stay; staff managers adhere to the line in some dependent relation.

- Staff is dependent on line more than line depends on staff.

- Staff should be on tap, not on top.

- Staff thinks; line thinks and acts.

- The staff is engaged in those activities that assist the line in the attainment of its (the line's) objectives. (The line is the organization; the staff are independent consultants retained on a full-time basis.)

- Line contributions are measured by results; staff contributions are measured by other means.

- Line is responsible for results; staff is not.

- Line accomplishes the objectives of the organization; staff assists the line.

- A line executive executes "with authority"; staff executives execute "by direction."

- A line executive installs a work flow system in a shop; a staff executive installs an accounting system for the president or by the direction of the president.

- A staff executive has no authority outside his own specialty; a line executive . . . (?) . . . .

- Staff tends to take a theoretical and "ivory tower" approach; line must deal in reality.

- Staff work deals with broad company programs; the line executives say, "Will it work in my shop?"

- Staff grows disproportionately to line. (Staff effort is non-productive.)

- The staff man must listen to the line man; the line man listens to the staff if he wants to and at his own risk, or he may be required to listen but then make his own decision.

- Staff is responsible for making good recommendations; line is responsible for deciding whether to use them.

- Line functions are more important than staff functions.

- Line executives should be promoted to top management positions; staff executives should be promoted to top staff positions. (There is a dual ladder.)

- The line executive works primarily with people; the staff executive works primarily with ideas.

- The line executive seeks a "satisficing" solution; the staff man

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- [illegible] [illegible] [illegible]

seeks the "right" solution.[22]

- Functional line executives derive satisfaction from their accomplishments; functional staff executives derive satisfaction from the practice of their professions.

Summary

The term "line" is used to describe a superior-subordinate relationship and depicts a chain of command or a line of authority. The term "staff" means assistance and support and is used to describe the relationship between one who advises and counsels and the one to whom the advice or counsel is given. Line relationships involve a delegation of authority to make decisions with respect to the accomplishment of basic objectives, whereas in staff relationships such authority is not delegated.

In small, simple organizations there is no formal distinction between decision-making roles and advice-and-counsel roles, the latter being in the form of recommendations or opinions concerning matters for which decision-making authority is not delegated. With the development of specialization and increased division of responsibility for functions, the label "functional staff specialist" came into use. Functions such as manufacturing and sales which could be identified closely with the realization of basic objectives were specified as line functions; all other specialist functions were called staff functions. Executives in charge of the various functions have also been labelled as either line or staff executives even though all executives have some line relationships and some staff relationships within the organization.

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[22]See Edward C. Schleh, "Make Your Staff Pay Its Way," Harvard Business Review, March-April, 1957, pp. 115-122, for an interesting pursuit of this idea.

Notwithstanding the forces--science, technology and the increasing size of industrial organizations--which brought about specialization, and the fact that specialization became vital to the survival of a competitive organization, specialists (staff specialists) and their functions have come to be regarded as "less important" than line functions. This is perhaps due to the fact that staff specialist activities contribute somewhat indirectly to the accomplishment of objectives and are therefore thought of as auxiliary, support, or service functions. Since executives in charge of the more direct functions are clothed with a measure of authority as to organizational objectives and staff specialists are not, the latter are in a position of dependency on the line for utilization of the contributions of specialist functions, notwithstanding their vital necessity in the accomplishment of objectives. Thus, to a certain extent the formal delegation of "line" authority to "line" functions is synthetic and is more of a convention than an effective control device.

The staff concept of advice and counsel has better expression in the staff assistant positions than in the functional specialist positions. Both types of staff, however, do exercise strong influence and considerable informal authority which cuts across hierarchical lines of formal authority in the organization.

Two unuseful generalizations have developed in line-and-staff theory: line is more important than staff, and staff people do not make decisions. Neither is wholly true; both are partially false.

In the traditional monocratic organization structure, every individual has one line superior. The hierarchical position of all personnel designated "line" is clear, both in line departments and in the organization as a whole. The hierarchical position (or level) of staff personnel is clear

[illegible] the Senate-Cabinet, Congress and the Commonwealth [illegible] of Independent organizations-certain [illegible] and [illegible] [illegible] the [illegible] qualitative [illegible] [illegible] [illegible]

within staff departments, but not in the organization as a whole or with respect to line personnel. What is missing is a clear channel through which indirect contributions to objectives flow through successive stages of more direct contributions for reflection, finally, in the accomplished objective. The word "and" in line and staff suggests the absence of such a single channel through which contributions flow.

CHAPTER II

THE NATURE OF THE CONFLICT

Conflict between line and staff has occurred almost from the beginning and in many separate organizations. The description of line's complaints against staff and staff's complaints against line have become almost standard in management and organization literature.[23]

What the Line Says About the Staff

Line executives think staff in general (1) seeks to usurp line authority, (2) does not give sound advice, (3) tends to steal credit from the line, and (4) has a parochial view. Line managers feel a keen sense of responsibility for accomplishment of the organization's basic objectives. While they may recognize the necessity of the staff, they resent what the staff does, or what they think it is trying to do, because they feel that by the use of staff service and especially staff advice, they have acquiesced to the staff and have forfeited a part of their own authority. Specific complaints made take various forms. The following are typical and are drawn primarily from articles and results of studies appearing in the professional journals since 1950.[24]

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[23]Mooney, op. cit., p. 38, points out that the senate of ancient Rome "which under the kings and the consuls of the early Republic had been purely advisory . . . gradually usurped line powers until, in one period of Roman History, it exercised the highest authority in the state."

[24]Major sources are Allen, op. cit., Maynard N. Toussaint, "Line-Staff Conflict: Its Causes and Cure," Personnel, May, June, 1962, pp. 8-20, and Melville Dalton, "Conflicts Between Staff and Line Managerial Officers," American Sociological Review, June, 1950.

- "They said the new personnel director would help me with my problems, but now he's trying to run my shop."

- "Hire a staff man to do the purchasing and the next thing you know, he's a top management adviser, a market evaluator, an economist; purchasing is incidental."

- "Procedures, procedures; what we need is production!"

- A staff specialist is a technician, a professional technician perhaps, but a technician nevertheless. (He is not a manager.)

- The counsel and advice staff offers is not always fully considered, well-balanced, and soundly tested.

- Staff is "academic" or "ivory tower." It lacks a baptism in the exigencies of the "real world."

- Staff tends toward sub-optimization, rendering their recommendations inconsistent with the basic objectives of the organization.

- Staff specialists are "nice people with a lot of education who go home and sleep at night." "This is understandable, however, since they do not make decisions."

- Staff are people who never had to "meet a payroll" or "get the goods out of the door."

- Staff people talk a professional jargon no one understands, except other staff people.

- Staff experts are expert in peripherial areas, but line people are experts in the things that count.

- "Staff are a bunch of well-dressed young bucks who are more interested in climbing the social and promotion ladder than in getting the job done. They think a clean shirt, shined shoes, and a fresh haircut are what makes one an executive."

- "What good is a well-written memorandum if the writer doesn't know what he is talking about?"

- "Staff could do with a little machinery grease under their fingernails."

- The staff man is more interested in his professional society than he is in the company.

- Often staff specialists are simply unnecessary impediments in the otherwise simple and efficient administration of production functions.

- "I never see the staff people except when they're trying to sell me something. When I have a problem, they're too busy working on their own programs."

- Staff men owe a certain deference to line men because staff efforts do not contribute directly to profits, whereas line contributions do.

- Staff is sterile; line is verile.

- Expert is a dirty word.

- Staff are the "status seekers."

- Staff are the "organization men." Conformity is their motto.

- If the results are successful, staff takes the credit. If not, staff shifts the blame to the line.

- "If line doesn't adopt staff's recommendations, staff will force them on line through a common superior or by dealing direct with the line man's subordinates."

- "The staff tells us we have problems which we don't think we have . . . . It usually turns out that staff is just trying to justify another 'big package' staff program."

What the Staff Says About the Line

Whereas line feels that staff tactics take the offensive, staff sees

line generally engaged in defensive maneuvers. Some of staff's comments about the line reflect a sensitivity to line criticism, and a degree of resignation to dependency on the line. By and large, however, staff takes the offensive. Staff men seem to feel that their contributions are not as effective in their ultimate utilization as they are valuable in and of themselves. The following are typical:

- Line managers attach too much importance to their own narrow operation, to the detriment of the organization as a whole.

- Line only comes to staff for assistance as a last resort. Staff seldom gets in on the problem until it is a real "bag of worms." If staff has a contribution to make in a program, staff should be consulted during the planning stage.

- Line resists new ideas. "They preach 'wait and see' while we're wasting thousands of dollars a day . . . . We'd do better with a little gumption and less caution."

- A line manager is too interested in just keeping his operational machinery working. If it were not for staff, line would seldom improve his own operation.

- Line loses sight of important staff contributions in its over-concern with its own authority and independence.

- Staff is given a job to do but is not given enough authority to do the job. Staff managers feel that if they have the best answer to a problem, they should be able to enforce the solution. To their way of thinking, knowledge is authority, and there is not much point in throwing organizational barriers between the man who knows and the job that has to be done.

- Line officers have a "provincial," parochial point of view. They

concentrate only on their own shops and expect an Adam Smith type of guiding hand to cause everything to turn out right.

- Staff resents being thought of as sterile. Staff claims at least equal verility with the line.

- Staff sometimes thinks line people are too self-centered and immature, having an authority-independence syndrome, and that therefore the line must be dealt with tactfully, patiently and understandingly.

- Staff feels that if the line is calling the shots and reserves the right to make all decisions in the light of information which line chooses not to divulge to staff, then sub-optimization is the only path open to staff.[25]

- Staff feels that since line does not consider staff as members of the first team, staff must maintain a detached perspective. "If my contributions are not well received here, I can always move elsewhere; it is my profession that counts."

- Since so much of staff's effective contribution depends upon acceptance by the line, staff should not attempt a program that does not promise overwhelming, say five-to-one, returns. Staff feels that if it had implementation authority, many smaller-return improvements could be made.

In one study staff men in the Federal government were asked if they would rather be associated with a line activity. The majority replied in the affirmative. Some of the reasons given were desires to:

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[25]Charles G. Dawes, first director of the U. S. Bureau of the Budget said, "Much as we love the President, if Congress, in its omnipotence over appropriations and in accordance with its authority over policy, passed a law that garbage should be put on the White House steps, it would be our regrettable duty, as a bureau, in an impartial, non-political and non-partisan way to advise the Executive and the Congress as to how the largest amount of garbage could be spread in the most expeditious and economical manner." The First Year of the Budget of the United States (New York: Harper and Bros., 1923), p. 178.

- be more closely associated with the agency's end product;
- be in the chain of command;
- avoid existing ceilings on advancement; and to
- be in areas where one's own contribution could be more readily identified.[26]

Why They Feel As They Do About Each Other

Hierarchical and Specialist Roles.--While there are almost as many theories on the causes of the line-staff "square-off" as there are authors, a major one is that conflict in organization arises from growing inconsistencies between specialist and hierarchical roles, and that such conflict has generated mechanisms of role defense.[27]

A major cause of this phenomena is the evolutionary process by which specialization has been incorporated into the traditional hierarchical, "line-of-command" structure. The growing imbalance between the rights of authority positions (hierarchical roles), on the one hand, and the abilities and skills needed in the modern technological age (specialist roles), on the other, generates tensions and insecurities in the authority system. Attempts to reduce such insecurity often result in behavior patterns which are dysfunctional from an organizational point of view although functional enough from the point of view of the insecure individual.[28]

Studies in human behavior among groups show that in any organized group, behavior is oriented both toward a common purpose and toward the attainment of personal goals. Group behavior accommodates both. Problem

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[26]See David S. Brown, "The Staff Man Looks in the Mirror," Public Administration Review, June, 1963, p. 73.

[27]See Thompson, op. cit., esp. Chap. 5.

[28]See Thompson, ibid., pp. 23-24.

solving in modern organizations is a group activity (a group of specialists). In matters involving personal goals, however, exogenous interference from the hierarchy tends to disrupt group behavior patterns. Since personal goal attainment tends to depend on recognition of the individual by the hierarchy, group behavior in problem solving is also disrupted. It is not only an opinion or an idea that wins in the group, but also a man wins recognition from the hierarchy. This situation is inherently competitive rather than cooperative. Intra-group competition attacks group solidarity and, consequently, the ability of the group to employ specialization in the pursuit of a goal.[29]

The ability of an organization to satisfy the personal needs and motives of its participants may be compromised by the definitions of hierarchical roles. Job satisfaction depends on such things as the degree of skill involved, the variety of activities, the degree of autonomy, the consistency of the job with the individual's self image, and the predictability of work relations. These elements of job satisfactions may come into conflict with hierarchical rights to assign activities and to supervise them. The right of arbitrary command may conflict with cultural norms of independence, and the right to unusual deference, with norms of equality and dignity. Thus, the self-images of subordinates are endangered. Thompson states further that,

> The most serious impact of the hierarchical system upon the achievement of personal goals within organizations results from its appropriation of the definition of success in our culture . . . . To be socially defined as "successful" in our culture, one must proceed up some hierarchy. To have public recognition and esteem, hence self-esteem, one must succeed hierarchically. This situation is painful for the specialist. Even if he is the kind of a person who can satisfy his dominance needs by mastering

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[29]See Victor A. Thompson, "Hierarchy, Specialization, and Organizational Conflict," Administrative Science Quarterly, March, 1961, pp. 498-503.

> a skill rather than people, he will be denied "success" unless he gives up his specialty and enters hierarchical competition.[30]

To provide hierarchical opportunities, organizations are departmentalized into specialist hierarchies within the organization. Compounding the frustration, however, is the somewhat arbitrary labelling of a few specialist hierarchies as line and others as staff. A mark of moderate success in our society is advancement upward through a staff hierarchy wherein only a portion of professional skill and competence is sacrificed. But consider the dilemma of a surgeon who aspires to hierarchical advancement. There are some specialties which of themselves are considered socially successful, but to be "really" successful in our society, one must be "on top, not on tap." This theory requires complete abandonment of a specialty within an organization.

The reality, as opposed to the theory, is that in organizations the specialist does acquire a legitimacy of authority throughout the organization; an authority which invades the domain of hierarchical authority. In this way there arises a growing discrepancy between expected authority and actual authority which lies at the heart of the line-staff conflict. Mechanisms of hierarchical protection against this threat of specialization are many, but it is illustrative to call attention to the devices of derogating staff importance ("line is more important than staff") and of attempting to suppress recognition of the unpalatable features of the relation by the use of fictions ("staff only advises; it does not command").[31]

Authority of specialists is not a product of the 1960's. It is not

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[30] Ibid., p. 508.

[31] See Thompson, ibid., p. 509.

unlike Taylor's functional authority and Follett's authority of position.[32] "If then, authority is derived from function,"--and she concluded that it is--"it has little to do with the hierarchy of position as such . . . . Authority should go with knowledge and experience; that is where obedience is due, no matter whether it is up or down the line . . . ."[33]

Much of the material in this section has been drawn from the writings of Victor A. Thompson, as cited. Thompson's thesis is that the ". . . most symptomatic characteristic of modern bureaucracy is the growing imbalance between ability and authority."[34] His summary of the bases of intraorganizational conflict is concise and conducive to insight, and is therefore presented as an Appendix to this paper.

Conclusions of two other authors tend in the same general direction:

> The role of the staff specialist continues to increase in importance and in scope in direct proportion to the growth in size and complexity of the business organization. The critical need to make the most effective use of their abilities has caused management to place increasing authority and responsibility in the hands of its specialists. Thus has arisen, in the gulf between line and staff, the executive with functional authority, neither wholly "fish nor foul," but with characteristics of both.[35]

Staff Specialist as Opposed to Staff Assistant.--It is meaningful to note that most of the attitudes which generate dysfunction are those which pit the staff specialist against the line specialist or against the line hierarchy. There seems to be much less friction in connection with "personal staff" or staff assistant positions. However, this group of staff positions is involved

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[32]See F. W. Taylor, The Principles of Scientific Management (New York: Harper and Bros., 1911), pp. 36-38, and Mary Parker Follett, "The Illusion of Final Authority," Advanced Management Journal (September, 1963), a paper presented at a meeting of the Taylor Society in New York, December 10, 1926.

[33]Follett, ibid.

[34]Thompson, Modern Organizations, op. cit., p. 6.

[35]J. K. Bailey and Allan H. Savage, "How 'Pure' Should the Staff Role Be?," Personnel Administration, September-October, 1965, p. 38.

in the friction in two primary ways.

In the first place, there is usually a direct working relationship between general staff assistants and staff specialists. It is common for the general staff assistant to "wear a second hat" as chief of a specialist hierarchy. For example, a vice president for research and development advises the chief executive regarding the product mix and related matters, but at the same time he is the line chief of a vast research and development organization in the company. Even if the company is "decentralized" and each, say, geographic division has a research and development department, there exists either formally or informally a direct line of communications between the field components and the staff vice president. The line head of a field division is aware of his lack of control over his research and development subordinate. He knows that failure to adopt his staff assistant's recommendation may generate a line directive from his own superior due to staff recourse upward through the specialist hierarchy.[36] The line organization may be decentralized, but the staff organization tends to remain centralized.

Secondly, even though general staff assistants are theoretically not in the "line of command" and have no authority, the theory does not square with the facts. Both specialists and lower-level line managers know that the logical way to "sell the boss" is through the boss's advisers, so in a real sense corporate staff officers wield real hierarchical authority. While they cannot issue directives in their own name, this is merely a convention and has little or no significance in the actual functioning of the organization. Thus line managers in the organization who have been told that they have authority and that staff executives do not with respect to the organization's basic objectives, find themselves paying homage and giving deference to staff

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[36]See Sayles, op. cit., pp. 86-90.

personnel. In actual practice, general staff assistants lengthen the chain of command at least one level. Since their authority is functional in nature, the "operator" often finds that he must clear his request or proposal through several such executives. Furthermore, since the chief executive and his staff are theoretically to be viewed as one integrated unit, most decisions are made as a practical matter by one or more of the staff assistants. The chief executive merely signs the implementing directives. This points up the arbitrary nature of the distinction made between line assistants and staff assistants.[37]

Lack of Understanding of Functions and Relationships.--Perhaps more than any other rationalization, this one is used to explain why line and staff clash. The inference is that there are too many executives in modern organizations who are uninformed and devoid of basic understanding of the "principles" of organization. Koontz and O'Donnell state:

> . . . Confusion over line and staff has been heightened by the tendency to regard them as a division of managerial functions . . . . The fact is that no manager can manage unless he has the authority to engage in managerial functions. One who does not plan, organize, direct, staff, and control can hardly coordinate and prosecute the activities for which he has been given authority . . . . Nevertheless, this does not mean that staff officers do not assist line officers in carrying out their managerial functions.[38]

That this approach does not recognize the meaning of authority is obvious. It disregards the fact that as surely as subordinate line officers receive their authority from the chief executive to engage in their "direct" functions, just as surely does the subordinate staff officer receive his authority from the same source to engage in "less direct" functions. The same authors also exhort:

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[37]See, for example, Henry H. Albers, Organized Executive Action (New York: John Wiley and Sons, Inc., 1962), pp. 119-123.

[38]Koontz and O'Donnell, op. cit., p. 140.

> . . . Not only must the staff executive recognize that his job is to counsel, but the line executive must realize that, when receiving such advice, it must be regarded as advice, and not command. Authority to manage must rest with the executive who stands in a line relationship with his subordinates. Failure to understand these relationships is probably the greatest single cause for friction in an organization.[39]

If this is in fact the case, then in modern organization there have to be a lot fewer staff relationships than commonly assumed, because both line and staff middle managers are in fact managing. Mooney recognized this and used a term which has more merit than has apparently been accorded it. He spoke of "auxiliary line functions" with reference to specialist activities which today are usually classified as staff specialties.[40] This line of thought is more compatible with the concept of a line organization structure than is the concept of staff service which has been adopted. The problem in the functional process areas is not so much one of advice and counsel, but a system which synthesizes all efforts, both "direct" and "indirect" in the achievement of organizational objectives.

Another author in a recent book said conflict arises when staff units fail to understand that they must operate for the purpose of making line units efficient, not to make their own units efficient.[41] Similarly in a recent article it was stated that staff men fail to realize the ". . . staff exists to serve line objectives."[42] On the contrary, it is this very understanding which intensifies conflict when role defense rears its head. Failure on the part of staff units to understand this might lessen conflict in a typical

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[39]Ibid., p. 142.

[40]Mooney, op. cit., p. 36.

[41]See Earl P. Strong, The Management of Business: An Introduction (New York: Harper and Bros., 1965), p. 318.

[42]Richard C. Dunnick and Robert J. House, "Improving the Management Staff Function," Personnel, November-December, 1962, p. 42.

situation.

In another article entitled, "How to Crack Down on Company Politics," the author inferred that a lack of basic understanding of--traditional--line-staff relationships gives rise to fear, which in turn gives rise to "politics" especially on the part of the staff. The implied solution is somewhat vague:

> An individual resorts to politics basically out of fear. This is always the hidden motive, but there are many surface ones linked to human needs for status, approval, power, authority, money, prestige, privilege, and responsibility. Politicians can operate effectively, however, only in situations where the top man ignores or condones the practice.[43]

What is the usefulness of the above? Is it that the "top man" should "crack down" on fear?

The Theory Itself as a Cause of Attitudes Resulting in Dysfunction.--As a result of the line-staff theory and of cultural values, line managers attain status, esteem, and self-realization and guard them jealously; staff managers seek to obtain them. A recent study showed that line managers consistently get more out of their jobs than do staff managers.[44] Line managers feel that they receive more esteem, autonomy, and self-realization than do staff managers. Line men are sure that forcefulness, self-confidence, and decisiveness are among the key needs for their jobs. Staff managers put more emphasis on agreeability and tact. More conformists (Whyte's "organization men"[45]) are found in staff positions than in line positions. Staff managers were slightly, but consistently more dissatisfied than line managers.

In another less structured study of staff executives in the Federal

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[43] J. D. Batten and James L. Swab, "How to Crack Down on Company Politics," Personnel, January-February, 1965, p. 11.

[44] See Lyman W. Porter, "Organizational Profile of the Dissatisfied Manager," Personnel Administration, May-June, 1965, pp. 6-11.

[45] William H. Whyte, Jr., The Organization of Man (New York: Simon and Schuster, 1956).

government, it was found that

> . . . commonly held concepts of the staff officer's role--that his chief functions are service and advice--have undergone considerable change in today's administrative patterns . . . that the staff officer is concerned, directly as well as indirectly, with policy matters.[46]

But the author stated, "Unfortunately, this view is not held by everyone in public administration." "There are many, particularly those in the line operations, who still see the staff person as someone with only a limited contribution to make, and often one that is felt to be of a negative rather than a positive nature." "As long as such opinions prevail, the staff role is likely to be hedged in frustration and the organization will be deprived of the full utilization of some of its most important professional people."[47]

The Theory Itself as a Cause of Work Relationships Resulting in Dysfunction.--The line-staff theory delineates authority, assigns tasks and establishes responsibility, but it has little to say about how the work is to be done. Difficulties arise in application:

1. Staff may take the initiative to advise without waiting for requests from managers with problems. Receptivity is poor.

2. Multiple initiations from advisory groups can place a manager in conflict over whose expertise is most valuable.

3. Advisory managers have relationships above and below the manager they are assisting; this upsets the equilibrium of the manager's position.

4. When asked to take over a problem, the advisory manager who previously was only too anxious to help may fail to respond because he would be infringing on the other manager's "responsibility" to handle the situation.

5. Advisory personnel may interfere with a manager's relationships

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[46]See Brown, loc. cit.

[47]Ibid.

with his own subordinates. At times, the adviser may initiate action for the other manager's subordinates. These initiations can conflict with existing orders. Even more troublesome, subordinates may find the advisory manager even more responsive to their ideas or problems than their own manager. Such a shift can injure the leadership position of the manager and cause him to resent the interference of the outsider.[48]

National Social Values as a Cause.--There is some evidence that line-staff frustrations are accentuated by national social values. Gerald G. Fisch observed:

> In Germany the dominant organizational concept for many years, and still the dominant concept, is the division on the basis of full equality between what is called "technical" and "commercial" (or "business") functions. Whereas in America we worship the line executive, in Germany equal status and prestige are nominally given to both the technical and the business executives. But frequently in German practice key technical personnel have even greater status and prestige than their business counterparts . . . .[49]

Semantics.--The use of the terms line and staff to classify people and tasks gives rise to connotations which cause friction. One author states, "If you and your wife had discussed 'which of us is line, and which of us is staff?' during the first year of your marriage you probably wouldn't have entered into the second year of your marriage."[50] He says that what is important is "discussion of function and responsibility . . . 'while you are getting the car greased, I'll buy the groceries.'" "But trying to classify this work as either line or staff would be ridiculous . . . . Any effort to force all people in a plant into the line-staff dichotomy is no more proper

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[48]See Sayles, ibid., p. 89.

[49]Gerald G. Fisch, "Line-Staff is Obsolete," Harvard Business Review, Vol. 39, No. 5, p. 72.

[50]J. Rich Johnson, "Line-Staff Revisited," Advanced Management, May, 1958, p. 17.

than classifying all the world's people as either 'tall' or 'short'; there are just too many 'in betweens' for a realistic two-part breakdown.'[51] Semantics as a cause of conflict was also demonstrated in Chapter I in examining definitions of the terms.

Some Causes of Antagonism Illustrated.--Melville Dalton studied line-staff conflicts in three industrial plants.[52] He reported the following as contributing factors to ill will between the two groups.

- As a group, staff personnel compared to line personnel were markedly ambitious, restless, and industrious. They were concerned with rapid promotion, making right impressions, and in receiving individual recognition.

- The line officers regarded their authority over production as something sacred, and resented the idea that they needed guidance of inexperienced staff men.

- Staff officers were younger, had more education, and dressed nicer than line officers. They considered themselves as agents of top management and tended to approach middle and lower class line with an attitude of condecension.

- Line officers were afraid to adopt staff innovations because they felt that it would show them up before their superiors. (Line should have thought of the improvements themselves.) Line would adopt staff improvements more readily if line could take the credit for them.

- Staff officers were frustrated because their promotion depended upon the nod of senior line executives more than upon their own staff superiors. As a result, staff engaged in a struggle for senior line recognition which often was organizationally dysfunctional.

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[51] Ibid.

[52] Dalton, loc. cit.

A recent study by the same author indicated that a different organization structure, one that discarded traditional theories, significantly reduced the conflict.[53]

Why They Feel As They Do About Each Other: Comment.--Attitudes of line and staff toward each other appear to be symptomatic rather than problematic. Their persistence over time, for one thing, tends to bear this out. Prejudicial clinging to static organization structure theories while at the same time subscribing to a dynamic approach to management in organizations is evident. Efforts to change antagonistic attitudes, that is, efforts to treat the symptoms of the conflict will be explored in Chapter III.

How Serious Is It?

First, there is a noticeable lack of evidence documenting the beneficial effects of line-staff conflict. A Federal government executive has rationalized that conflict must be beneficial; otherwise the organization structure would have been changed:

> . . . For a large organization is a deliberately created system of tensions into which each individual is expected to bring work-ways, viewpoints, and outside relationships markedly different from those of his colleagues. It is the administrator's task to draw from these disparate forces the elements of wise action from day to day, consistent with the purposes of the organization as a whole.[54]

Undoubtedly line and staff conflict serves at least to some extent in maintaining balance in an organization through recurring role defense and redefinition, and it may spur the generation of ideas for improvement through competition for recognition by superiors.

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[53]Melville Dalton, "Changing Staff-Line Relationships," Public Administration, March-April, 1966, pp. 3-5 and 40-48.

[54]Harlan Cleveland, Assistant Secretary of State For International Organizations, "Dinosaurs and Personal Freedom," The Saturday Review, February 28, 1959, p. 36.

There is much indictment of the conflict however, for its dysfunctional effects. Time is wasted. Decisions are slowed. Efforts and decisions are suboptimized. Emotional considerations crowd out relevant criteria. Communication in all networks is distorted. Efforts are directed away from both organizational and individual goals and objectives. Strategy becomes secondary to tactics. Barriers to cooperation are reinforced. Koontz and O'Donnell lead the attack:

> Much confusion has arisen both in literature and in management practice as to what line and staff are, and the results of this confusion have more than semantic significance. There is probably no other single area of management which in practice causes more difficulties, more friction, and more loss of time and effectiveness.[55]

W. J. Donald said twenty years ago:

> If we have any particular curse in an organization today, it is in the cross currents of authority, the division of authority, the fact that a foreman hardly knows who is boss, hardly knows to whom he should go for instruction.[56]

Another author saw the development of a schism in organization due to staff hierarchies:

> Centralized services and budgetary and personnel controls are giving up a bad case of organizational schizophrenia as the control of mechanics becomes dissociated from, and builds up competing interests with, policy direction.[57]

Formal responsibility for basic objectives seldom coincides with actual responsibility for results. Line may become overly-dependent on staff and pass all its problems for solution rather than for analysis and recommendation. Or, staff may over-sell the line. As one author pointed out,

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[55]Koontz and O'Donnell, op. cit., p. 135.

[56]W. J. Donald, in an address to the American Management Association, cited in Albert Lepawsky (ed.), Administration (New York: Alfred A. Knopf, Inc., 1949), p. 303.

[57]Willard N. Hogan, "A Dangerous Tendency in Government," Public Administration Review, Summer, 1946.

> . . . on the one hand, there's the risk that staff advisers may impose too rigid requirements on the line with the aim of insuring a "scientific"--though frequently unrealistic--line operation. On the other hand, there's the equal risk that line managers may abdicate their authority and controls to "scientific" staff specialists . . . .[58]

Probably the most serious charge made against line-staff conflict is that it will tend to proliferate itself in modern organizations unless traditional structural theories are abandoned. Traditionally organizations are monistic with one supreme authority and a unity of command. To legitimate internal conflict would be inconsistent with the monocratic nature of the hierarchy. It would require formal bargaining procedures. It is difficult to solve a problem which is not officially recognized.

> Modern organizations [says Thompson], through the formal hierarchy of authority, seek an "administered consensus." Conflict resolution, therefore must occur informally by surreptitious and somewhat illegal means. Or else it is repressed, creating a phony atmosphere of good feeling and superficial harmony.[59]

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[58]Dunnuck and House, op. cit., p. 41.

[59]Thompson in Administrative Science Quarterly, op. cit., p. 521.

CHAPTER III

EFFORTS TO REDUCE THE DYSFUNCTION: TRADITIONAL APPROACHES

In General

The literature reflects two general attitudes toward meeting the problem of conflict between line and staff. One is that there are no standard solutions, but that "good managers" know how to effectively handle the problem; that it is somewhat of a "trade secret" with each such manager and that others will have to work something out for themselves. The other attitude is similar but one which generates multiple prescriptions similar to those freely proferred for hangover. The primary consideration in either case is to control the staff.

The first approach is illustrated by statements such as the one on page 31 above: the "top man" should "crack down" on the conflict. The latter could be illustrated by voluminous quotations encountered by this writer while researching the subject. The following few have been selected to illustrate range. They appear below generally in the order of the frequency with which they occurred.

Insure Understanding of Functions

What is stressed here is orientation and effective indoctrination through educational institutions, through company training programs, company policies and procedures, and through daily operating routines. The perspective sought is one which will insure the unquestioned acceptance of "principles" such as those which were listed near the end of Chapter I. Note

that the emphasis is not on the validity of the concepts, but on their being clearly understood and accepted.[60] In fact, many of the "principles" have become cliches among students and practitioners in the field. The weakness of this approach is the cognitive dissonance produced in the individual when he tries to apply what he believes.

A more rational approach is to insure understanding of the basic objectives of the organization.[61] This will improve perception of the "real world," but causes reality to be no less at odds with traditional structural role concepts of line and staff.

Define Responsibility and Establish Written Rules

This prescription takes the legalistic approach and gives each opponent a chapter and verse to cite in defending his case. Implicit in rules is a mediator or judge who resolves any controversy arising therefrom. This is one of the roles of a common (line) superior. Albers states that the common superior ". . . should not hesitate to support or restrain his staff or operating executives whenever constructive differences of opinion begin to deteriorate into internecine warfare."[62] Leonard Sayles noted, "The two most often cited [means of resolving differences] are the existence of rules that automatically settle the dispute and an appeal to a common, higher authority." But he countered, "We have observed rather little use of

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[60]It seems unnecessary to document this, but see, for example, Koontz and O'Donnell, op. cit., pp. 137-142; Albers, op. cit., pp. 131-133; and any of a variety of management texts.

[61]See David S. Brown, "Importance of Understanding Objectives," The Federal Accountant, March, 1964, pp. 63-73, and Glen A. Bassett and R. H. Hawk, "Function and Dysfunction in the Organization," Personnel, September-October, 1965, pp. 23-31.

[62]Albers, op. cit., p. 133.

either."[63]

Reduction to writing is simply a communications vehicle. Relationships are not established by communications per se. Relationships may be observed and may be described in writing, but to establish a relationship, the components of a system are arranged in such a way as to produce the desired relationship. A change in the relationship requires a rearrangement of the components. To paraphrase a cliche, it is the organization chart which delineates the rights of members, but it is the actual structure of which the chart is an attempted representation which determines the roles of members. Written rules are static; organization structure is dynamic.

There are a number of reasons why conflict will not be laid at the doorstep of a superior for resolution. A primary one is that both contenders run the risk of losing; both normally lose some freedom of discretion in their areas of operation. Airing of one matter tends to expose several others which both parties find embarrassing. "Finally," according to Sayles, "it is not considered comme il faut to run to the boss."[64] Managers are supposed to solve problems, not create them. It is widely recognized that an organization cannot long exist without cooperation among peers and at the peer levels. The hierarchical communications networks would otherwise be hopelessly jammed.

The Salesmanship Approach

This tenet is widely held; it pervades the literature. Since the staff recommends and the line decides with respect to basic objectives, the burden is upon the staff man not only to seek out the line manager's problems

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[63]Sayles, op. cit., p. 187.

[64]Ibid., p. 188.

and the factors which contribute to them, and to recommend sound, practical solutions, but also to dress-up the solutions in such ways which will make the solutions attractive to line managers. Good ideas are useless unless they are implemented. Only line managers can implement. To what degree the staff man must sell his recommendations is the subject of considerable discussion. Opinions run the gamut from compulsory consultation to no line-initiated contacts. The supporting postulate, in all cases, is that staff men do not make decisions.[65] Even where staff specialists do have the authority to decide concerning company-wide accounting procedures or company-wide employee grievance procedures, the proponents of the salesmanship approach rationalize that the idea was "sold to the President" who made the decision. The lack of cogency of this argument to distinguish between line and staff authority is too apparent for comment.

Melville Dalton pointed to the salesmanship role as a source of staff specialist frustration in the three companies which he studied.

> The unsophisticated staff officer's initial contacts with the shifting, covert, expedient arrangements between members of staff and line usually gave him a severe shock. He had entered industry prepared to engage in logical, well-formulated relations with members of the managerial hierarchy, to carry out precise, methodical functions for which his training had equipped him. Now he learned that (1) his freedom to function was snared in a web of informal commitments; (2) his academic specialty (on which he leaned for support in his new position) was often not relevant for carrying out his formal assignments; and that (3) the important thing to do was to learn who the informally powerful line officers were and what ideas they would welcome which at the same time would be acceptable to his [staff] superiors.[66]

The salesmanship prescription formulated for the staff officer's dilemma described above is strong medicine:

1. <u>In the absence of authority, exercise "influential influence."</u>

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[65]Mooney covers this point thoroughly, <u>op. cit</u>., ch. V and XIV.

[66]Dalton in <u>American Sociological Review</u>, <u>loc. cit</u>.

2. Relate staff efforts to the company as a whole. Be sensitive to the line manager's needs. Become familiar with all phases of the business, but don't get in the way while you're doing it; be tactful about it.

3. Give sound and reliable advice. Build your reputation. Prove to the line manager that "staff are good." Feel a sense of responsibility for the outcome of the advice you give. (You don't really have any, however.)

4. Help solve problems as the line manager sees them. The real problem is not important if the line manager doesn't see it. Don't work up your own big package. He's not interested in the rest of the company. He's interested in his own shop. Don't tell him he has a problem; ask him. He'll tell you if he has one.

5. Above all, avoid playing the expert. Show a sincere and personal regard for his abilities, interests, and self growth, and refrain from flaunting your specialized education in his face.

6. Let the line manager take the credit for your ideas, if they turn out to be good ones. It is, after all, his shop and if he hadn't accepted the idea and tried it, the successful change never would have occurred. He may resist your suggestions because of his own ego drive and the desire for independence. Agreeing to change may make him feel that he is admitting to his own deficiencies. The wise staff man will see to it, therefore, that others take most of the credit for successful changes.

7. Don't be frustrated. Every staff man, after all, faces the same challenge of relating his specialized knowledge and methods to the primary needs and objectives of the organization and of winning the line management's acceptance and support for his function.

8. Avoid clashes. By avoiding clashes of authority and the buck-

passing so commonly found in line-staff relations, respect for the staff man's position will be built up and in this way will ultimately increase his influence on the company's operations.[67]

In prescribing the cure, undoubtedly the physician has put the patient on the critical list. The implicit assumptions in the salesmanship approach include at least the following:

1. The line officer:

a. is probably a very insecure individual;

b. may be extremely egocentric;

c. is probably incapable of discussing an issue on its own merits and of relating his job to any other in the organization;

d. is usually easily manipulated, "if you know how."

2. The staff officer:

a. can know his job and the line officer's job also;

b. in addition, is a diplomat;

c. is morally above reproach, because he must use as a minimum subterfuge, camouflage, and deceitful merchandising, all for a good cause;

d. is a self-appointed guardian of the organizational objectives, with innate characteristics of the chief executive;

e. but since he is working with the "king's harem," he must disguise himself as a eunuch;

f. does not have ego needs except those satisfied by secretly

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[67]This is neither a humorous nor a sarcastic approach. See Toussaint, loc. cit.; Sayles, op. cit., p. 91; and Robert C. Sampson, The Staff Role in Management (New York: Harper and Bros., 1955). Sampson states, for example, "For the staff man it will mean a more humble, subordinate, comprehensive approach calling for a variety of skills, with less singleness of theme and effect. The line executive's authority is accepted carte blanche. The onus on the staff man is to have the capacity and willingness to counsel with executives on their problems, . . . and to help them arrive at their solutions," p. 9.

knowing that he is so superior to line officers.

g. naturally chooses his friends and associates from among his intellectual peers, and not from among line officers.[68]

3. The most serious implication is that cooperation between line and staff is a one-way street.

Without any other cause of line-staff conflict, adoption of the salesmanship concept on the part of the staff is breeding ground enough to enlarge the conflict to major proportions unless line officers (1) are not aware of the strategy; (2) really are as they are implied to be; or (3) have an extremely high tolerance threshold. Some combination of the three is possible.

Porter's recent study of 1,916 American managers drawn from a wide cross-section of executives at all levels indicated that

> . . . the staff manager has to be somewhat more versatile than the line manager. Not only must the staff man place more emphasis on each of the five other-directed traits [cooperation, adaptability, caution, agreeability, and tact]; but he must also show as much, if not more, of certain traits of inner-directed behavior. [The five inner-directed traits measured in the study were forcefulness, imagination, independence, self confidence, and decisiveness.] On the other hand, the line manager apparently can afford to concentrate his job behavior in more limited dimensions, putting relatively heavy emphasis on certain aspects of inner-directed behavior such as forcefulness and decisiveness . . . .[69]

Whether the indications of Porter's study represent a cause or an effect of the salesmanship approach for staff executives is an area which is meritorious of further study. If they represent an effect, line managers have been the victims of a grave injustice. Management theory today, as will be discussed in Chapter IV, puts emphasis on interdependence rather than independence;

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[68]The alternative to (a) through (g) above is that the staff man is an outsider--an independent consultant--working with "insiders."

[69]Lyman W. Porter, Organizational Patterns of Managerial Job Attitudes, a monograph, an American Foundation for Management Research study (New York: American Foundation for Management Research, 1964), p. 44.

on the other-directed--relationship--traits rather than on the inner-directed traits. (Porter's study also showed that management level has a much stronger relationship to job attitudes than does the type of position, line or staff.)

Other Approaches

Organize staff on the basis of objectives.--Staff groups, according to this approach, should be organized on the basis of the broad objectives to which they are to contribute, rather than on the basis of function or specialized knowledge. Dunnuck and House provide the following guidelines:

> If a staff activity exists to provide advice to line management, the staff group should report to the same organizational level as do the line managers it advises . . . . If the staff group serves the entire organization, it should be separated from the line and should report to an executive who coordinates both line and staff activities. A staff group that gives critical advice to or assists higher management in control should be assigned to an echelon equal to that of the line people being advised or controlled.[70]

Organization by project represents another attempt to minimize staff-line conflict. It is a method of focusing attention on the relative importance of task accomplishment and requires line and staff to work more closely with each other. Project management emphasizes functional responsibility, but smacks of separate authority represented by a hierarchy of line coordinators readily available to make the necessary decisions for all concerned.[71]

Delegate regulated authority to staff.--Give staff authority to accomplish basic staff programs, but set specific controls on staff use of authority. Authors of a study of functional authority concluded:

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[70]Dunnuck and House, op. cit., p. 45.

[71]See Vlcek, loc. cit.

> . . . The most effective control or limit on possible unwanted effects from the use of functional authority is the restriction of its flow in the organization: 86% of the participants [in a study of thirty-four companies varying in size, of which twenty-six subscribe to the use of functional authority] restricts its effect to no more than the first level below that of the staff executive with such authority.[72]

Measure staff performance on a meaningful basis.--Sayles proposes to measure staff performance by the ability of staff personnel to "fit into the organization."

> . . . The requirements for and satisfactions from these jobs should be derived from successful interrelationships with other work systems. In fact the successes (and failures) of these groups should be measured (monitored) in terms of their ability to fit into the organization as an operating system. Too often they are measured by purely internal technical standards of performance and competency.[73]

The logic of the above is not questioned with reference to the staff, but with reference to all other components of the organization. Sayles is not advocating conformity as such. He is emphasizing that staff should be measured by how effectively its contribution favorably affects the accomplishment of objectives. However, what he implies is that line personnel should be measured by some other means. He also implies that the organization exists independent of staff, that staff has not been given a place in the organization structure, and that it is up to staff to "fit in" somewhere.

Another author thinks that perhaps the advertising director should be held accountable for producing additional sales as opposed to simply advertising; that the personnel director should be held accountable for increasing productivity of employees vice administering the company's personnel program; and that the head of the inspection department should be required to maintain or attain a minimum quality of marketed product rather than administering the inspection function. Thus, he says, ". . . staff and line are being

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[72]Bailey and Savage, op. cit., p. 38.

[73]Sayles, op. cit., p. 110.

judged by the same tough criterion; there is no 'double standard.'"[74]

Another author confirms that both staff and line have stakes in the "results" for which, according to line-staff theory, only the line is held responsible:

> . . . It is not correct to describe a research department manager as responsible for his firm's new products, a sales manager for the sales figures . . ., a safety engineer for the prevention of accidents . . . . Each of the employees contributes by his work to the outcome mentioned. But he cannot by himself be said to be responsible for that outcome.[75]

There obviously is no accurate way in which any group or any member of an organization can be given credit precisely equal to contribution to the end product produced.

Give dual credit to line and staff.--In many organizations, various often intricate measures have been developed by staff managers themselves to justify the costs of their contribution to organizational objectives. These usually consist of highly questionable self-appraisals of the total "savings" for which their activities can be given credit. These "totals" serve to increase tension between staff and line officials.[76] One suggestion is to give full credit to both line and staff: "When line and staff overlap in accountability for a result, both should get full credit for the accomplishment of that result."[77]

This idea conveys a vagueness similar to that experienced by many people with regard to deficit spending on the part of the Federal government. There is just so much "credit." To "give credit where credit is due" is the

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[74]Schleh, loc. cit.

[75]Elliott Jaques, Equitable Payment (New York: John Wiley & Sons, 1961), p. 61.

[76]Sayles, op. cit., p. 196.

[77]Schleh, loc. cit.

balanced budget concept. How can credit be created? Perhaps credit is valued in proportion to its availability: increase the supply and its value declines.

Job rotation.--Where executives can be shifted among line and staff positions, this has been found to be effective in reducing line-staff conflict.[78] Individual perspectives are broadened and stereotypes applied to individuals are broken. Specialization, by its very definition, however, limits the extent to which job rotation can be practiced, especially at lower and highly technical levels of supervision.

Recognize the conflict and live with it.--Leonard Sayles makes this point:

> Most Americans and Western Europeans are brought up to believe that consensus and unity are an essential ingredient for any successful political, social, or economic institution. But this firm belief in oneness does not square with the facts. Companies, like all large organizations, have built-in divisions, and even in the proverbial "long run" they tend not to be eliminated. The manager must anticipate that more than one team will be playing in his organization and not find this immoral or upsetting.[79]

A practicing manager offered comment to the effect that the manager simply first must evaluate the role of staff functions by determining the part staff must play in the over-all success of the operation; then it becomes a matter of developing the program which must be followed to accomplish these objectives: ". . . the manager is responsible for determining line-staff relationships." "To my knowledge, no one has yet found a substitute for management."[80]

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[78]See, for example, American Management Association Special Report No. 18, Line-Staff Relationships in Production (New York: American Management Association, 1957).

[79]Sayles, op. cit., pp. 140-141.

[80]Morley H. Mathemson, "How Maintenance Serves Line Management," AMA Special Report No. 18, op. cit., p. 101.

This approach at least advocates open recognition of the problem, but essentially implies that there is no solution, or that "good managers" somehow know what to do. Even Chester I. Barnard two months prior to his death had little encouragement for those who seek a solution to line-staff conflict. In an informal interview he was asked, "What is your thinking about the line-staff dilemma?" Barnard replied:

> Well, all effective staff work, or most of it at least, involves a moral aspect. It's persuasive, fundamentally. Now, it's persuasive partly because whoever is talking is expert in a particular segment. But that is not sufficient. Experts are very frequently quite ineffective because they are unacceptable to line organizations due to overbearing manners, looking down their noses, or what have you. And the top men of the organization have to make it work, insofar as they can, by insisting that subordinate line officials take into account what the experts say and advise. In any specific instance the line will always be supported in any good organization. But if, in general, you find a man in the line who doesn't listen to anybody except himself or his boss and who doesn't take into account all the factors and complexes that are involved, then, in practical words, why you just have to get rid of him. He can't work in the organization, and he's just as bad as the staff man who is really expert in some particular thing but thinks that's the only thing in the world, and he has to have his own way about it. No, you can get almost an infinite variety of methods by which staff work and line work are conducted and there's no clear-cut division on that subject and in my opinion there never will be.[81]

Traditional Approaches: A Summary Analysis

The prescriptions for line-staff tensions are directed heavily toward the staff. Staff is viewed as the problem; as an exogenous, incompatible element which will not compound with the line organization. In lieu of a compound, an acceptable mixture should be sought. Exhortations to the line are few and incidental in nature. Principally they are:[82]

a. Line should make use of staff. Otherwise ". . . staff service

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[81]William B. Wolf, "Precepts for Managers--Interviews with Chester I. Barnard," California Management Review, Fall, 1963, Journal of the Graduate School of Business Administration, University of California, Los Angeles.

[82]See Allen, op. cit., pp. 374-375.

always tends to atrophy."[83]

b. Line should make proper use of staff, that is, seek staff assistance and seriously consider staff advice.

c. Line should keep staff informed.

While no attempt has been made in this chapter to distinguish between hierarchical echelons of the line officials with whom there is staff conflict, it is apparent that the conflict is not so much between subordinate staff assistants and their hierarchical line superiors. The conflict is primarily between the staff specialist and functional line officers, or as Mooney would say, between line and auxiliary line.

Traditional attempts to lessen the conflict have, in all probability, intensified it. Insuring accurate understanding of traditional concepts of line-staff relationships most surely contributes to conflict. The two groups would be less antagonistic if the understanding advocated were more vague. Certainly the prime strategy of success recommended for the staff officer should never be divulged to the line if conflict is to be minimized.

Making sure basic organizational objectives are understood and stressing cooperation are certainly worthwhile and are no doubt effective, but simply telling people to work together has its limitations especially when routine work relationships are not compatible with the telling. Written rules, legalistic role definition, inferences of degrees of importance of roles, and advocation of subterfuge and manipulation are antithetic to cooperation and tend to produce imbalance. The organizational "mixture" sought persists in separating. What is needed is a management and organization theory which describes and assists in producing a "compound." The probes being made in search of such a theory are examined in Chapter IV.

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[83]Mooney, op. cit., p. 42.

CHAPTER IV

IN SEARCH OF A BETTER THEORY

A New Emphasis

Perhaps ironically, the development of the individual with the growth of specialization has focused attention on the reality of a complex interdependence in organizations. Interdependence smacks of equality in importance of contribution, at least in a marginal sense. Interdependence challenges the traditional distinction between hierarchical and specialist roles. It tends to ally authority with conditions rather than positions. It attacks the concept of the concentration of authority and decision-making in the hands of a hierarchical few. It tends to ally rights with abilities and to define roles as a combination of the two.

If specialization implies interdependence, interdependence likewise implies specialization: specialists in what to do; specialists in how to do it; specialists in when, where, and why to do it; and specialists in doing it. Interdependence implies a bargaining and agreement among specialists if coordination is to be achieved. It also implies, according to Barnard, a "surplus of satisfaction." That is, "If each man gets back only what he puts in, there is no incentive, . . . no net satisfaction for him."[84] From the point of view of the organization, it implies a synergistic effect of increased output.

Interdependence among individuals in an organization suggests a degree of independence on the part of the individual with respect to the

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[84]Barnard, op. cit., p. 58.

organization and a dependence on the part of the organization with respect to the individual. Again quoting Thompson:

> Under the influence of the primitive monistic ideal, modern organizations are modeled more on the parent-child relationship than on the adult relationships of specialist equals and colleagues. Attempts to maintain the legitimacy of the ideal lead to a great deal of hypocracy and pretense and to the creation of myths, such as "the ignorance of the masses," "the indispensability of leadership," and "the magical power of fear."[85]

Barnard, in 1938, said ". . . Successful cooperation in or by formal organizations is the abnormal, not the normal, condition." "What are observed from day to day are the successful survivors among innumerable failures."[86]

There is greater emphasis today in organization and management theory on the interrelationships among people and between people and their environment. This is evidenced by the growing concern with human relations and the effects of small groups in organization, and by the idea of participative management. Traditionally, cooperation has been sought within a structure in order to accomplish objectives. There is evidence that current thought is along the lines of structuring a system which facilitates both. Thompson asserts:

> In the modern period of specialization, the one desideratum that overshadows all others in importance is cooperation. The activities of specialists must be meshed together, and the predisposition to submit to this co-ordination is what we mean by cooperation. Consequently, the test of social institutions cannot be only their productivity. Also of importance is whether they promote co-operation . . . . The needs for products change, but the need for co-operation grows more intense. The ultimate test of organizational practices, therefore, must be their effect on the co-operative system.[87]

Conflict between line and staff constitutes a prime target for efforts to improve interpersonal relationships.

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[85]Thompson, Modern Organizations, op. cit., p. 20.

[86]Barnard, op. cit., p. 5.

[87]Thompson, loc, cit., p. 179.

The Trend Away From Line and Staff

Discarding the terms (Semantics).--In Chapter I, the difficulty in defining line and staff was demonstrated. This in itself suggests that they are of little or no usefulness in describing organizational phenomena. Information theory demands that symbols transmitted be ascribed the same meaning by the receiver as that ascribed by the sender. "Terms usually used in discussions of organizations are 'line,' 'staff,' 'operating,' 'functional,' 'advisory,' and 'service'; but often the distinctions between them are hazy and the interrelationships not clearly defined."[88]

A vice president of Johns-Manville Corporation said in 1954, regarding line and staff:

> I usually cannot understand what other people mean when they use the terms. Like two coins that have been long in use, they have grown smoothe with much handling--or mishandling . . . . Let us beware of the idea . . . that everyone is either a line man or a staff man. Often these duties are quite mixed . . . . I have often been asked to delineate line and staff functions. I cannot do that. I have never heard anyone else do that. So, far from trying to delineate them, I recommend that you wish them out of your hair.[89]

The discarding of the line and staff labels with the many and varied connotations associated with them would free scholars and managers from a great handicap in explaining organizations and in attempting to build meaningful models. (For example, this paper could have been written on a more important subject.)

Recognition of Functional Authority.--As technology becomes more complicated, the number of specialized groups within an organization and the number of bases from which decisions can be made increase. The so-called

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[88]Carl Heyel, How to Achieve Effective Line-Staff Teamwork Through Seven Basic Line-Staff Relationships (Brookhaven, Pennsylvania: Assignments in Management, 1964), p. 1.

[89]Alvin Brown, op. cit., pp. 35-36.

line-staff exception to the "normal" chain of command comes close to being the rule.[90] One study indicated that staff officers can make decisions affecting the line without any apparent ill effects on the line.[91] The authors explained the relationship on two grounds: (1) It appears that people can work together under a variety of organizational arrangements. "People get used to it" was the typical explanation. (2) There may be a "unity of purpose" between the staff and the line--they may think alike--which makes it possible for staff executives to share in certain line responsibilities without staff-line friction.[92]

In support of functional authority, another author makes the point that ". . . the fact that someone established these [staff] functions in order to bring into the organization expert, specialized help is indicative of the responsibility entrusted to them."[93] He apparently feels that, traditionally, staff authority has not been commensurate with staff responsibility.

In the recent study of thirty-four companies (previously described), the results showed that "well over one-half of the respondents regard the functional authority relationship as an expansion of the staff concept . . . . Furthermore, over one-third of the respondents endeavor to change their formal organizations where improvements . . ." due to the use of functional authority develop informally.[94]

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[90]See Sayles, op. cit., p. 30.

[91]Charles A. Meyers and John G. Turnbull, "Line and Staff in Industrial Relations," Harvard Business Review, July-August, 1956, pp. 113-124.

[92]Ibid., p. 121.

[93]Robert D. Hulme, "Resolving the Line-Staff Muddle," Advanced Management, November, 1959, p. 28.

[94]Bailey and Savage, loc. cit. Emphasis in the original.

Changes in industry have turned research, product development engineering, accounting, and finance into departments that represent the very core of profit opportunity for today's manufacturing enterprises.[95] "Surely there must be something wrong with a concept which treats as advisory or support groups those functions that create the hub of today's manufacturing enterprises."[96]

Fisch notes a trend in U. S. and Canadian companies toward what he calls the functional-teamwork concept of organization structure. Functions are grouped into three categories: process functions, those controlled on a time basis such as sales, manufacturing, purchasing, advertising, and distribution; resources control functions, the watch dog functions, such as finance, personnel, and facilities; and the relations function which directs the company's communications effort both within and outside the company.[97] Clarifying the relations function, he states:

> Indeed when one deals with the various staff and line groups charged with relations responsibilities in most corporations, the corporation appears to be a multi-headed monster without cohesiveness of direction or any consistency in its objectives, and without the means of expressing these objectives. The relations function seeks to remedy this confusion.[98]

The functional-teamwork concept does not make the traditional distinction between staff specialists and functional line executives. It purportedly makes three basic improvements: (1) covers all necessary tasks and gives appropriate weight and authority to each; (2) achieves a logical--rather

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[95] Ibid.

[96] Fisch, op. cit., p. 68.

[97] Ibid., p. 74.

[98] Ibid.

than an arbitrary--separation among these functions; and (3) gives "specialization with honor" to the people who head these functions, relegating to none the sterility of a staff position. It recognizes that the people called "staff" in some organizations are really just as vitally and critically concerned with what are arbitrarily called line decisions as are the "line" executives. It also recognizes that in violation of traditional concepts of organization structure and lines of communications, in actual work situations people do coordinate their efforts and do work together in ways which cut across functional lines. Fisch concludes, ". . . if key people cannot do their best living and working under a conceptually confused and contradictory organizational system such as line-staff, perhaps they could be relieved of considerable strain and anxiety and made more efficient and productive if the line-staff concept were discarded completely."[99]

Interdependence: A Challenge to Traditional Concepts

While discarding of labels and recognition of a greater distribution of decision-making centers may ameliorate internal conflict by removing negative influences, the positive approach to coordination merits more consideration. The line-staff structure has served at least reasonably well to discipline efforts on the basis of organization objectives. It has guarded against the self-procreation of staff contributions. If it is to be discarded, what structural control device will take its place? What atmosphere is conducive to cooperation among specialists, and coordination of specialist and hierarchical roles? What descriptive terms square with the facts?

Barnard said in 1938 that "human organisms do not function except in

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[99] *Ibid.*, p. 79.

conjunction with other human organisms."[100] More recently, social scientists have pointed out the amazing extent to which individuals are regulated and coordinated by the informal groups of which they are members. This group-identification approach to coordination recognizes the importance of cooperativeness, the willingness to be coordinated. It severely attacks the old individual-incentives approach. Emphasis is placed on shared values, the alignment of official organizational values in compatibility with organizational sub-group values. Traditional emphasis has been on converting individuals to organizational goals, through manipulation. Straight conversion is highly improbable according to the social scientists. As a result it may be simulated, resulting in phony cooperativeness and hypocracy. Is not an individual's good effort enough? Why must organizations also demand his soul? Is the traditional authority system weakening?; is legitimacy declining?[101]

Under advanced specialization, cooperation must depend on recognized and accepted mutual interdependence. Authoritative direction is none-the-less important, but it must be disciplined and defined by reason and the reality of the environment in which it is exercised. Not only must the "authority of the situation" described by Mary Parker Follett be considered, but general situational patterns must be recognized in attempting to delineate authority.[102] With status and function for all, interdependencies are at least tolerable because the necessity for them can be demonstrated. Artificially created interdependencies--those created by sheer acts of hierarchical

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[100]Barnard, op. cit., p. 11.

[101]See Thompson, loc. cit., pp. 183-184.

[102]See Mary Parker Follett, loc. cit.

authority--are intolerable and dysfunctional. The official system of regulation should be a description of the actual interdependence which in fact exists in the organization structure.[103]

Basic policy direction should emanate from specialists in that area, from specialists who devote their time and efforts to that function, from sub-groups whose primary task is policy direction. Most of the members of the sub-group or groups in which broad policy makers work are each, in turn, also members of other sub-groups in which narrower policy decisions are made, and so on throughout the organization. There is a continuum of interest in and influence on the making and execution of policy throughout the organization. This would recognize the fact that decisions--even policy decisions--are made throughout the organization by each member of the organization.[104] Drucker has said:

> The business enterprise of today . . . is primarily an organization of professionals with highly specialized knowledge exercising autonomous, responsible judgment. And every one of them--whether manager or individual expert contributor--constantly makes truly entrepreneurial decisions which affect the economic characteristics and risks of the entire enterprise.[105]

The fact that some decisions are over-ruled by a member's on sub-group or by other groups does not alter the fact that each member knows that he had a chance to be heard. The ability to contribute would be officially accorded the right to be consulted. The important phenomenon is that the right to be heard incurs a member's allegiance to his group and gives rise to a personal commitment on his part. This personal commitment is what management has

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[103]See Thompson, loc. cit., pp. 187-188.

[104]See Likert on the "linking pin" theory, Rensis Likert, New Patterns of Management (New York: McGraw-Hill, 1961), esp. ch. 8.

[105]Peter F. Drucker, "Long-Range Planning, Challenge to Management Science," Management Science, April, 1959, p. 242.

sought through the ages. The commitment thus incurred is real, personal, and not a simulated one. Traditional theory has failed to consider that individual incentives rarely lift human behavior out of the ordinary; that heroic behavior is group-inspired behavior; and that an individual's personal values which determine how he will respond to various incentives are the result of his associations with groups, both within and outside a particular organization.[106]

Increasingly today writers are saying that organizations should be structured to take advantage of an individual's predisposition to cooperate in small groups, and that the key to structure is the compatible arrangement of those groups in a systematic order; that is, management's task is not to make decisions so much as it is to construct an "interaction-influence system" through which good decisions will be made.[107] McGregor's Theory Y is receiving more recognition; Taylorism and the economic man are receiving less.

Transitional Steps

Moves to tear down barriers to cooperation and to emphasize "functional teamwork" have been discussed. Other transitional steps which have been suggested are:

1. Working supervisors.--Time available for close supervision should be restricted.

2. Job enlargement.--Whenever machine technology allows, the micro-division of labor should be ended.

3. Discipline the hierarchy.--Strip it of its exaggerated deference. Subject activities performed in these roles to the same kind of instrumental

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[106]See Thompson, loc. cit., pp. 190-191.

[107]See Likert, op. cit., esp. ch. 12.

questioning and modification as other activities in the organization. Repeal theoretical laws which establish offenses against "a ruler's dignity." Put an end to acts of pure authority which establish interdependencies which are unnecessary.

4. Redefine "success."--Establish perhaps two equal salary and benefits scales, one for functional specialists and one for hierarchical positions. Realign concepts of esteem and status to values approximating each other.[108]

5. Reconsider the "generalist" concept.--Administrators of an increasing number of organizations must be trained specialists, at home in the other-worldly language of particular subjects and perceptive in judgment among divergent opinions of members of a scientific and professional community.[109]

6. Think in terms of systems.--There is too much concentration on components and "brush fires." Administrators must think in terms of adjustments rather than solutions, and in terms of how an adjustment to one system component will affect that component's interaction with other components, and finally how the adjustment will affect the interaction of the organization as a whole with its environment, or larger systems.[110]

Changing Roles of the Staff Assistant

While much has been said regarding the changing concepts of traditional staff specialist roles, there is also evidence of a similar trend toward recognition of what structural relationships actually are in staff

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[108]The four suggestions above were made by Thompson, loc. cit., pp. 194-196.

[109]See James W. Fesler, "Specialist and Generalist," Public Administration Review, Fall, 1958, p. 370.

[110]See Richard A. Johnson, Fremont E. Kast, and James E. Rosenzweig, "Systems Theory and Management," Management Science, January, 1964, pp. 367-384.

assistant roles, as opposed to what traditional staff-line theory prescribes that they should be. A recent major study sponsored by the National Industrial Conference Board revealed little, if any, meaningful distinction between the authority of line assistants and staff assistants at the corporate level of divisionalized companies.[111] The authors concluded:

> Considering the broad scope of activities that these general executives coordinate, and considering their very close reporting relationship to the chief executive, it seems evident that these general executives have a perspective, responsibility, and authority approaching that of the chief executive himself. Even though some coordinate only staff functions, it is questionable whether any of them can be considered "staff executives." Regardless of title, in a substantial sense, they are "assistant" or even "associate chief executives." To a certain extent this is also true of some of the staff and operating executives among the companies analyzed . . . .
> [The staff general executives] . . . can be considered staff executives only in the limited sense that they direct staff work. But in the management of the total complex that is a divisionalized company, they are as much line as staff in the responsibility and authority they exercise relative to establishing and maintaining the objectives and policies that shape and form the business.[112]

To paraphrase another quotation, there is nothing so unuseful as an (invalid) theory.

Implications for the Future

The Declining Autocracy.--Drucker declared that "ninety per cent of the trouble we are having with the chief executive's job is routed in our superstition of the one-man chief."[113] Three primary forces have greatly complicated the chief executive's job in recent years: (1) the impact of technology--ninety percent of all the scientists who have ever lived are

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[111]See Harold Stieglitz and Allen R. Janger, "Top Management Organization in Divisionalized Companies," Studies in Personnel Policy, No. 195 (New York: National Industrial Conference Board, 1965).

[112]Ibid., p. 18 and p. 36.

[113]Peter Drucker, Cited in D. Robert Daniel, "Team at the Top," Harvard Business Review, March-April, 1965, p. 74.

alive today; (2) the broadening product base of large companies; and (3) the international scope of operations. The chief executive has become a figurehead and a pawn in the hands of his own organization. There logically follows the concept of a plural executive--a top management team. Labels such as "office of the president," "chief executive office," "executive department," and "executive committee" are emerging. The Dupont Company, for example, adopted this concept several years ago. Traditional theory states that the chief and his staff are to be considered as one integrated unit. This theory is being substantiated in practice and today is being expanded to include the concepts of associate chiefs and joint responsibility and authority.[114]

The management oligarchy concept has several major advantages: (1) it recognizes that no single person can adequately plan and control the activities of a complex business; (2) it recognizes that the so-called line and staff assistants have a valuable contribution to make toward achieving basic objectives; (3) it multiplies the awareness of each member of the team by allowing him close contact with a group of men, each of whom has special complementary talents and each of whom is required to act as president in his assigned field; (4) it precipitates the abandonment of a parochial view on the part of each member; and (5) ". . . the equality of the team members as partners in decision--an attribute they share by definition--may be underscored and projected in the rest of the organization . . . ."[115]

Some writers see the change as inevitable with the growth of modern organizations notwithstanding the logic which applies today:

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[114]See Daniel, ibid., pp. 75-77.

[115]Daniel, ibid., p. 77. See also Stieglitz and Janger, op. cit., p. 27.

> . . . The top will not only be released to think; it will be forced to think. We doubt that many large companies in the 1980's will be able to survive for even a decade without major changes in products, methods, or internal organization . . . . We might expect more impersonal, problem-oriented behavior at the top, with less emphasis on loyalty to the firm and more on relatively rational concern with solving difficult problems . . . . We surmise that the "group think" which is frightening some people today will be a commonplace in top management of the future.[116]

Another writer sees a complete separation of staff assistant roles and specialty roles:

> . . . The team members cannot function successfully if its members are cast in the self-conflicting roles of advocates one day and judges the next. Hence it is doubtful that team members will ever be able to operate divisions or manage staff departments successfully, Ideally they should wear one hat and fill one role--a corporate one.[117]

A New Road to the "Top".--A member of a future top management team will have to possess more of the "other-directed" traits described by Porter (Page 44). Ironically these are the traits now associated with staff men:

> . . . Compared with the one-man chief, who is usually picked for his leadership abilities and personal dynamism, and often for his entrepreneurial talents, members of the top-management team must be less aggressive, less individualistic, and less arbitrary . . . . Though the team member must be apolitical and unafraid to express his views boldly and positively, he must also be capable of subordinating himself to the team's will if his views on a particular subject are rejected.[118]

While ". . . moving up through the line will become increasingly unlikely,"[119] staff men also suffer from a limited perspective. But since some staff specialists such as management engineers have had to pursue a relatively detached and objective approach to the organization as a whole, they are consequently better fitted for top management positions than are line executives whose orientation is typically rather narrowly directed and who have built

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[116]Harold J. Leavitt and Thomas L. Whisler, "Management in the 1980's," Harvard Business Review, November-December, 1958, pp. 46-47.

[117]Daniel, op. cit., p. 77.

[118]Ibid., p. 76.

[119]Leavitt and Whisler, op. cit., p. 47.

up strong allegiances to the operational functional specialty or specialties with which they have been associated.[120]

Two authors are of the opinion that both line men and staff men are too prejudiced for succession to the management oligarchy and predict that training for these positions will be taken over by universities, with on-the-job training done at higher levels in the organization through such positions as that of assistant to a senior executive.[121]

A New Dual Ladder?--If functional specialists are too prejudicially oriented to narrow functions and points of view, what is their future with regard to maturity and self-fulfillment in their own organizations?

Some writers think that the rapid expansion of information technology being witnessed today will force a split in middle management: the greater portion will shrink and sink into a more highly programmed state; and the smaller portion will proliferate and rise to the environs of the top management oligarchy.[122]

The opportunities available in the "team at the top" may not be as limited as it may appear. Another author sees the likelihood of the emergence of a "super staff" to serve the "executive office"--a staff groomed and trained to possess a broad perspective and to serve as training ground for membership in the plural executive.[123]

This leaves unanswered the question regarding the future for functional specialists. To the extent that their work does in fact become highly

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[120]Interview with Carl Clewlow, management consultant with Arthur Young and Company, Washington, D. C., on March 16, 1966.

[121]See Leavitt and Whisler, op. cit., p. 47.

[122]Ibid., p. 45.

[123]Daniel, op. cit., p. 81.

programmed, automation may well be an easier and more appropriate solution. Specialization would tend to decline in the process functions and proliferate in the super staff--programming--areas. Indications are that the human being does not "program" passively. If, on the other hand, the demand for functional specialists in the operating areas continues to increase along with super staffs and management oligarchies, some duality of career opportunities will have to be established.

Summary Analysis

The trend in the current literature is away from the traditional theories and "principles" of organization and management. In general, there appears currently to be:

Greater emphasis on:	Than on:
interdependence in organization	either dependence or independence;
cooperative systems	execution through hierarchical authority;
inter-relationships	chain of command;
understanding of values	attempted conversion or changes in values;
changing the organization	changing the people in the organization;
spheres of influence	lines of authority;
individuals	stereotypes;
groups	individuals;
group incentives	individual incentives;
authority dictated by roles	roles dictated by authority;
what people do	what position they are in;
cooperation and productivity	productivity only;

Greater emphasis on:	Than on:
mutual respect	deference;
Theory Y	Theory X
a dynamic equilibrium of interdependence	formal definition of specification of interdependence; and
status and function	status or function

There is a growing disparity between line-and-staff theory and what is actually observed in organizations. Almost invariably line-and-staff is discussed in conjunction with the "formal" organization, but in order to describe much of what actually goes on in organizations it is necessary to speak also in terms of the "informal" organization.

Some corporations are attempting to define their formal organizations in greater compatibility with the informal aspects observed. Thus, functional authority among specialists is being formally recognized and concepts such as that of "functional teamwork" are altering the traditional model.

The term "staff" is becoming less-meaningfully associated with functional specialists than with higher-level assistant positions. The staff assistants, however, are being recognized as members of the authority-possessing, policy-making, decision-making, executive management team. A complementary phenomenon is the increasing recognition of the fiction rather than the function of the single chief executive. Not only is the synergistic potential of small "informal" work groups being weighed carefully, but there are increasing pressures for the group, or "associate chief" approach to top management. There are indications, in other words, that the moving equilibrium between the depth of the hierarchy and the width of the span of control has bumped into a "full-employment" or maximum-usefulness limit. A new model with additional parameters appears to be necessary for continued growth.

The increasing contribution of scientific methods and techniques to the art of management is affecting organization structure. As information systems become more efficient, some writers foresee decision-making authority as becoming more allied with function and ability than with scalar level. There will be less opportunity for, and greater resistance to the arbitrary exercise of authority based only on hierarchical position. Decisions would have to be evaluated in terms of their effects throughout the system. It may mean a more highly programmed or structured process in basic functional areas. This, in turn, may conflict with job enlargement and specialization. In any event, a systems approach will require a broad perspective on the part of managers, a perspective not possessed by either line men or staff men today. Attempts to follow traditional line-and-staff "principles," however, have, in general, better equipped today's staff men for effective participation in tomorrow's organizations than have they the line man. The irony of this is that our cultural values have placed the greater emphasis on the development of the traits possessed by line men.

The future for the specialist is not clear. One thing seems clear enough, however: concepts of the rational-economic man, the social man, and the self-actualizing man (in terms of individual needs and incentives--motivation) are giving way to a concept of complex man. Managers of the future, regardless of specialty and width of horizon, will have to possess a spirit of inquiry and be good diagnosticians with regard to people in organizations in order to accomplish their tasks. This one capability may be difficult to acquire wholly in any school other than that of experience. It could serve to counter very effectively the threat to specialists of programmed functions. At least one writer (who sees today's manager being forced to look, work, and think "sideways" and to de-emphasize vertical relationships)

has said the future--and to some extent the present--will ". . . demand a different type of specialist, with a broader perspective, with as sharp an insight into human and organizational relationships as into mathematical and mechanical ones . . . ."[124]

Current trends and indications of the future demand a reappraisal of attitudes on the part of executives and would-be executives. Victor A. Thompson has concluded that mutual recognition of complex interdependence among members of organizations will foster adult relationships, ". . . and the grown-up kindergartens through which we now conduct our affairs will pass unregretted from the scene."[125]

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[124]William H. Read, "The Decline of the Hierarchy in Industrial Organizations," Business Horizons (Fall, 1965), pp. 71-75.

[125]Thompson, loc. cit., p. 197.

CHAPTER V

SUMMARY AND CONCLUSIONS

Summary

The term "line" in line-and-staff theory denotes a method of delegating authority in an organization in such a manner that all contributions made will be channelled through authorized and specified monitering components to insure compatibility with organizational objectives. The term "staff" implies support and is a general label applied to those components of an organization which have not been specified as line and which have not been formally granted authority with respect to basic organizational objectives. Implicit in line-and-staff theory is that line authority keeps staff contributions proportionate to all other contributions necessary in achieving predetermined objectives, and controls the influence which staff contributions have on that achievement. Two general types of staff contributions are recognized: those in the form of functional services, sometimes called auxiliary line functions, and those in the form of advice and counsel. Advice and counsel generally follow two basic channels: from one functional area (which contributes relatively indirectly to objectives) to another functional area (contributing more directly to objectives); and from hierarchically subordinate positions to superordinate positions.

As scientific and technological advances required increasing removal of specific functions from the direct auspices of administrators having line authority, the term "staff" came to have less application to routine process functions. The phenomena seemed to be better described as functional

specialization wherein some functions contributed relatively directly to the achievement of basic objectives and other functions contributed less directly. The dividing line between direct functions for which line authority was delegated and indirect functions for which line authority was withheld thus continuously shifted in an arbitrary fashion. Administrators of all functions needed the necessary authority to perform their tasks, but an arbitrary dividing line aggravated the process by which indirect contributions were reflected in the accomplished objectives. Some functions came to be considered more important than others.[126] Some specialists answered only to hierarchical superiors with respect to their contributions; other specialists were required to answer not only to hierarchical superiors, but also to specialists in the more direct process functions who had been clothed with line authority.

Conflict among specialists resulted. Those with line authority sought to defend their arbitrary basis on which the delegation was based. Those without line authority challenged the basis of the delegation. Battle lines were drawn and a multitude of role-defense rationalizations evolved. People began to be labelled and stereotyped as either line or staff. The fact that most jobs included a mixture of process functions and advice and counsel functions tended to be disregarded.

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[126]Fisch, op. cit., p. 68, observed, "The line-staff concept was first applied in a period when product lines were relatively stable, when companies manufactured a comparatively homogeneous product line, and when the factory was the center of operation . . . . Whereas the hub of corporate life used to be in the one simple factory, today it is in the produce and service mix . . . . Indeed, the only way in which any good-size American company may be understood is through a complete and thorough examination of its total product line. The product line, of course, is created by research, development, and engineering, or by acquisitions or mergers that are studied by the finance department. These functions have become the very core of profit and loss opportunity for most large companies in the U. S. But research, development, engineering, and finance under the line-staff concept, are classified as staff or advisory functions."

Since specialists clothed with line authority tended to be promoted to higher line positions, and other specialists tended to be promoted to higher staff--usually staff assistant--positions, line and staff stereotypes became ingrained throughout the organization.

Varied attempts have been made by both sides to lessen the conflict. They have met with limited success because most actions taken were designed to tolerate a certain amount of conflict and still achieve enough vital coordination to accomplish some level of output. Basically line has concentrated on controlling staff influence and staff has concentrated on penetrating line's defenses by various means.

Since line personnel have been in basic control of organizations through the hierarchy, it has paid lip service to cooperation and teamwork and has simulated concessions of its authority in such forms as human relations programs and emphasis on leadership.

More recently, steps have been taken to abandon the line-staff concept and to realign the organization structure. The line-staff theory assumed predetermined objectives. The influence of the staff man on setting objectives has been recognized. A realization of a complex system of interdependence is dawning.

The apparently natural predisposition of individuals to cooperate in small groups is being carefully considered in structural realignment. Attempts are being made to redefine authority on a more palatable and rational basis. The legitimacy of authority has evolved from a charismatic basis to a legalistic (feudal) basis; from legalistic to traditional; and now is moving from a traditional basis to one of ability to contribute. The future in large organizations in the United States may reveal the evolvement of an organization structure that is less autocratic in nature and more in harmony

with concepts of democracy.

Conclusions

Line and staff have dead and dying meanings in organization theory. Their evolution in the beginning was an attempt to make static a dynamic phenomenon, that of cooperative organization structure. Line-and-staff conflict has centered around specialist activities, but the syndrome has enveloped the entire organization structure. The conflict has been a manifestation of an invalid theory, of the error of the postulates upon which the line-staff theory is based, and not of a lack of understanding or misapplication of the theory. The better the theory is understood and the more accurately it is applied, the greater the conflict is likely to flare. Line-staff conflict is a symptom, not a cause.

It is now being increasingly recognized that each member of an organization has an effect, which cannot be completely controlled, on the equilibrium of an organizational system. When an additional specialist, for example, is added to an existing organization, his marginal contribution will tend to relatively equalize with that of all other contributors. In the process, achievement of stated objectives may be enhanced, or the objectives may be altered to reflect compatibility with a new system equilibrium.

The traditional bureaucratic structure is giving way to a structure which facilitates cooperation and elicits a genuine sense of personal commitment by

1. accommodating a blend of individual goals and organization goals,

2. providing an atmosphere which reflects a recognition of overlapping small groups and by providing for purposeful avenues of relationships among those groups,

[illegible] Geometry.

Conclusions

[illegible] Thus the [illegible] is [illegible] [illegible] [illegible]

3. defining authority as a function of ability to contribute to objectives, and by

4. providing avenues for the effective pursuit and attainment of individual need fulfillment in parallel with or identical with those through which individual contributions to objectives are made.

Distinctions among individuals are more likely to be made in the future on the basis of small group participation. Distinction among groups is likely to be made on the basis of their patterns and frequency of relationships with other groups. Stereotyping is unlikely because no two individuals and no two groups are likely to fit the same descriptive base.

The time has arrived for self-fancied line men and self-fancied staff men to engage in critical self-analysis; to consider changes in their attitudes; to ponder the structure of their personality traits and the bases on which they have been developed. Unless they do, the "real world" will pass them by and leave them with the old men sitting on the court house lawn recounting the battles and experiences of ages past.

APPENDIX I

BASES OF INTRAORGANIZATIONAL CONFLICT

1. Conflict is a function of disagreement over the reality of interdependence.

   1.1. Lack of agreement about the reality of interdependence arises from lack of acceptance of specialties.
   This lack of acceptance results from lack of accreditation of specialties, which, in turn, is a function of
   1.1.1. Their newness, or
   1.1.2. The creation of specialties by acts of authority.

   1.2. Lack of agreement about the reality of interdependence is also a function of differing perceptions of reality. These differing perceptions are a function of position in
   1.2.1. The authority system,
   1.2.2. The status system, and
   1.2.3. The system of person-to-person communication (the group system).

2. Conflict is a function of the degree of disparity between authority, the right to be consulted, and the ability to contribute to goals. This disparity arises from

   2.1. Growing dependence upon specialists (a function of the process of specialization) while hierarchical role definitions are changing more slowly; and

   2.2. The allocation of rights (delegation) in disregard of the needs of specialization (acts of sheer authority).

3. Conflict is a function of the degree of status violation involved in interaction.

   3.1. Status violation results from advancing specialization and consequent growing interdependence of high- and low-status positions--from positional claims to deference, on the one hand, and the fact of dependence upon specialists, on the other.

4. Conflict is made more or less intense by the relative importance of the interdependence to the success of the organization.

5. Finally, conflict is a function of the lack of shared values and reality perceptions (identifications), which, in addition to being a function of personalities, are

   5.1. A function of the lack of spontaneity and freedom of communicative interaction, which is
   5.1.1. A function of the resistance to penetration from without of the principal behavior systems--the authority system, the status system, and the technical system (specialization).

In short, conflict arises from growing inconsistencies between specialist and hierarchical roles.

Source: Victor A. Thompson, Modern Organization (New York: Alfred A. Knopf, 1964), pp. 108-109-

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